Relationship to Traveler: 

Spouse

# Date: September 22, 2021

## **Employee Post-Travel Disclosure of Travel Expenses**

CRETA Date/Time Stamp:

Post-Travel Filing Instructions: Complete this form within 30 days of returning from

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

Transportation	Lodging Expenses	Meal Expenses	Other Expenses
Expenses	Lodging Expenses	Meal Expenses	Other Expenses
Good Faith	Estimate	Description	
Actual Amount	Actual Amount	Every \$120	Every

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate				
☐ Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if

mecessary.):
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More continued in the many regarding 9/11/61 and
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TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

09/20/2021 (Date)

(Signature of Supervising Senator/Officer)

Name of Traveler:

Date/Time Stamp:

Date: September 22, 2021

## EMPLOYEE PRE-TRAVEL AUTHORIZATION

<u>Pre-Travel Filing Instructions</u>: Complete and submit this form at least 30 days prior to the travel departure date to the <u>Select Committee on Ethics</u> in <u>SH-220</u>. Incomplete and late travel submissions will <u>not</u> be considered or approved. This form <u>must</u> be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Employing Office/Committee:	Senator Romney
Private Sponsor(s) (list all): Pew Charitable T	rusts
9/10/21 - 9/12/21 Travel date(s):	
Note: If you plan to extend the trip for an	y reason you must notify the Committee.
Destination(s): New York, NY	
Explain how this trip is specifically connected to	
This is a management and leadership program design focused around the 20th anniversary of the attacks of	gned for Senate Chiefs of Staff to foster bipartisan working relationships, and on September 11, 2001.
Name of accompanying family member (if any):  Relationship to Employee: Spouse Chi	
I certify that the information contained in this for	m is true, complete and correct to the best of my knowledge:
1 W (Date)	(Signature of Employee)
TO BE COMPLETED BY SUPERVISING SENATO Secretary for the Majority, Secretary for the Minority,	
I, Senator Mittl Romney (Print Senator's/Officer's Name)	hereby authorize ENDOUM DOWN (Print Traveler's Name)
-	ept payment or reimbursement for necessary transportation, lodging, and
	above. I have determined that this travel is in connection with his or her
private gain.	nd will not create the appearance that he or she is using public office for
of the Senate. (signify "yes" by checking box)	employee's spouse or child is appropriate to assist in the representation
07/27/2021 (Date)	14:11 Comment.
(Date)	(Signature of Supervising Senator/Officer)

Elizabeth Johnson

# PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

Date: September 22, 2021

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1.	Sponsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
2.	Description of the trip: Bipartisan Senate Chiefs of Staff Conference
3.	Dates of travel: 9/10/2021 - 9/12/2021
4.	Place of travel: New York, NY
5.	Name and title of Senate invitees: Chiefs of Staff (see attached list)
6.	I certify that the trip fits one of the following categories:  (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal <u>and</u> do not retain or employ registered lobbyists or agents of a foreign principal <u>and</u> no lobbyist or agents of a foreign principal will accompany the Member. officer, or employee at any point throughout the trip.  OR-
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
7.	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.  - AND -
	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8.	I certify that:  The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement.  - AND-
	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

**USE ONLY IF YOU CHECKED QUESTION 6(B)** 9. I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies: (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip. (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10). (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip. **USE ONLY IF YOU CHECKED QUESTION 9(B)** 10. If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel: An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip. Briefly describe the role of each sponsor in organizing and conducting the trip: The Pew Charitable Trusts is the sole organizer and sponsor of this trip Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission: 13. See attachment Briefly describe each sponsor's prior history of sponsoring congressional trips: 14. See attachment

RECEIVED BY: SECRETARY OF THE SENATE

Date: September 22, 2021

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15.	Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional
	trips):

see attachment

16. Total Expenses for Each Participant:

	Transportation	Lodging	Meal	Other
	Expenses	Expenses	Expenses	Expenses
18:J Good Faith estimate  D Actual Amounts	\$475 total:  (\$230/ Amtrak roundtrip \$125.00 - coach bus in NYC \$120 - ferry to and from Ellis Island)	\$286/night \$572 total	\$228 (\$76/day)	none

17. State whether a) the trip involves an event that is arranged or organized without regard to congressional part1c1pation or b) the trip involves an event that is arranged or organized specifically with regard to congressional participation:

This trip has been arranged specifically with regard to congressional participation

18. Reason for selecting the location of the event or trip

New York was selected, as the weekend coincides with the 20th anniversary of the 9/11 terrorist attacks.

19. Name and location of hotel or other lodging facility:

New York Marriott Downtown

20. Reason(s) for selecting hotel or other lodging facility:

New York Marriott Downtown can provide the necessary meeting space for the planned seminars, is

located in proximity to 9/11 Memorial & Museum and can provide the required number of guest rooms to

accommodate the group

Name of Organization: The Pew Charitable Trusts

Address: 901 E Street, NW, Washington, DC, 20004

Fax Number:

E-mail Address: tluzzatto@pewtrusts.org

AND DESCRIPTION OF

PEW

Bipartisan Senate Chiefs of Staff Conference New York City | September 10-12, 2021



#### View in web browser

# Bipartisan Senate Chiefs of Staff Conference

## The Pew Charitable Trusts

# Invites You and Your Spouse/Significant Other To the 8th Biennial

# Senate Chiefs of Staff Management and Leadership Conference

New York City
September 10–12, 2021

The Pew Charitable Trusts will host a conference for the Senate Chiefs of Staff from September 10-12, 2021, in New York City. It promises to be an engaging and in formative weekend where you can learn from some of the most interesting speakers on management, leadership and civility today. A copy of the agenda is <u>available here</u>.

We will depart from Union Station on Friday, September 10 on a private rail car and return on Sunday, September 12. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. If you wish to invite your spouse, you may reimburse Pew for those expenses (estimated to be at least \$800 due to cost of needed travel during this weekend in NYC) after the conference.

Your pre-travel paperwork should be received by the Select Committee on Ethics, 220 Hart, by Monday, August 9, 2021 to ensure processing by the legal deadline. The Committee is very strict about their deadlines and will bar attendance by staff who submit late. For that reason, we recommend you complete and submit immediately even if you're not sure you'll attend as there is no penalty if you're approved but later decide you can't attend (other than we need to know as soon as possible if you change your mind). Click here to download the paperwork.

#### **CLICK HERE TO REGISTER (USE .GOV EMAIL)**

If you are unable to attend, please click here

We look forward to seeing you in New York City this fall!

Tamera Luzzatto
Senior Vice President, Government Relations
The Pew Charitable Trusts
tluzzatto@pewtrusts.org
(202) 540-6501

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Date: September 22, 2021

The Pew Charitable Trusts makes every effort to comply with federal, state, and local government ethics rules, including when hosting events. Please make sure that your participation is consistent with applicable ethics rules.

This email was sent to abby atkins@wicker.senate.gov

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## Bipartisan Senate Chiefs of Staff Conference New York City | September 10-12, 2021



### Friday, September 10, 2021

9:30am Attendees unable to obtain COVID testing through the Office of

Attending Physician (OAP) or obtain a test within 72 hours of departure arrive at Union Station, Gate G, for COVID testing (Senate Staff who can be tested at the OAP should do so within 72 hours of departure; we will only have tests for non-staff)

10:00am Attendees who have obtained a COVID test within 72 hours of

departure check in at Union Station, Gate G.

Grab and go box lunches and beverages provided during check in.

11:05am Depart for NYC via Amtrak 84

2:33pm Arrive New York City, Penn Station/Moynihan Hall

Board buses based on last name, as marked

3:30pm Check in to Marriott Downtown

85 West Street at Albany Street

4:50pm Meet in Hotel Lobby for Transportation to Gracie Mansion

6:00-8:00pm Reception at Gracie Mansion Hosted by Mayor Bill de

Blasio

Mayor de Blasio will share reflections on the 9/11 attacks and the nation's largest city's approach to recovery from the effects of the COVID-19 pandemic on the city's economy and its

citizens' health.

### Saturday, September 11, 2021

7:30-9:30am Breakfast at your leisure, Marriott Downtown Hotel

Financial Ballroom, Second Floor

8:30-9:45am Reading of the Names of 9/11 Victims

Moments of Silence at 8:46 and 9:03

Broadcast in the Breakfast Room

10:00-11:30am Panel Discussion on Federal Recovery Support After 9/11

As discussion of legislation for COVID recovery continues, panelists involved in the federal government's response to 9/11 will discuss their experiences. Tamera Luzzatto - moderator (The Pew Charitable Trusts, formerly Senator Clinton's Chief of Staff), Moderator; Polly Trottenberg (former Senator Schumer Staff), Jim Mazzarella (former Governor Pataki staff), and Glen

Caplin (formerly Senator Gillibrand's staff).

000000000777 Date: September 22, 2021 RECEIVED BY: SECRETARY OF THE SENATE

11:30am-12:00pm Break

12:00-1:30pm Lunch Presentation by Jocelyn Kiley, Associate Director, Pew

**Research Center** 

Presentation on emerging data on general trends and issues related

to 9/11

1:30-3:00pm Panel Discussion: Federal Response to 9/11

> Family members and other leaders in supporting victims of 9/11 will discuss their experiences. Christine Falvo (Rubenstein, former Senator Clinton staff), Moderator; Mary Fetchet, Founder, Voices of 9/11; Carol Robles-Roman, Dean of Faculty, Hunter College; former Special Counsel /Director of Public Affairs to Chief Judge Judith Kaye and Chief Administrative Judge Jonathan Lippman (2001); Dr. Jacqueline Moline, Chair, Occupational Medicine, North Shore University Hospital; Suzy Ballantyne,

Executive Director, 9/11 Health Watch

3:00-5:30pm Break

5:30pm Meet in Marriott Lobby for walk/transport to Ferry to Ellis Island

Board Ferry to Ellis Island (this is the only ferry for our group) 6:00pm

Please be on time to clear security and be prepared to show your

vaccination card to enable an on time departure

Reception on Ellis Island 6:45-7:45pm

7:45-9:00 pm Dinner and Keynote Address from Admiral William

McRaven

Admiral McRaven was the chief of the U.S. Special Operations

Command (USSOCOM) which had responsibility for

synchronizing Department of Defense plans against global terrorist networks and, as directed, conducting global operations. Under his watch, U.S. Special Operations Forces delivered what will be perhaps viewed as the crowning victory in America's war against terror: The May 2011 raid that killed al-Qaeda leader Osama bin Laden. After retiring from military service, hewent on to serve as chancellor of the University of Texas and is recognized

for his inspirational speeches and writing on leadership.

The 9/11 Memorial is open until Midnight for its annual Until 12:00am

**Tribute in Lights.** More information here:

https://www.911memorial.org/visit/memorial/tribute-light

### Sunday, September 12, 2021

7:00-8:00am Breakfast, Bill's Bar & Burger

(Hotel Lobby)

Checkout and load bags 7:45-8:00am

Walk to 9/11 Memorial Museum 8:00 - 8:15am

000000000778	RECEIVED BY: SECRETARY OF THE SENATE Date: September 22, 2021
8:30 Sharp	9/11 Memorial Museum opens early for our group, which will be greeted at 8:30 by Museum President & CEO Alice Greenwald and Kevin Sheekey, Global Head of External Relations at Bloomberg LP, representing Museum Board Chair Hon. Michael Bloomberg
8:30– 9:30am	Visit to the 9/11 Memorial Museum. For more information on what the group will see on the descent to bedrock: <a href="https://911memorial.org/visit/museum/about-museum">https://911memorial.org/visit/museum/about-museum</a> For more on exhibitions: <a href="https://911memorial.org/visit/museum/exhibitions">https://911memorial.org/visit/museum/exhibitions</a> Given time constraints, the museum recommends the group visit the Memoriam exhibition. Finally, there is a names registry where individuals can search for victims from their respective states. You may wish to visit the names on the Memorial Saturday night, and use this tool to locate names geographically: <a href="https://names.911memorial.org/">https://names.911memorial.org/</a>
9:30 am	Depart 9/11 Museum for Marriott Downtown Hotel
9:35 am	Depart Hotel for IAC Building, 555 West 18th Street
10:00am-11:00am	Lessons Learned During COVID-19: Small Business Owners Asahi Pompey, Global Head of Corporate Engagement, Goldman Sachs (moderator); Louis DeCuzzi, Founder & President, Dirt Road Riding USA (Brunswick, OH); Jessica Johnson-Cope, President, Johnson Security Bureau Inc., Bronx, NY; Margueritte Ramos, Owner, ShadeFLA (Miami); Brent Reaves, President, Smokey John's Bar-B-Que (Dallas).
11:00am-12:00pm	Lessons Learned During COVID-19: Corporations and Philanthropy Kathryn Wylde, President of the non-profit Partnership for New York City (moderator); Darren Walker, President, Ford Foundation; Jonathan D. Gray, President, Blackstone; David Chubak, CEO of US Retail Banking, Citi; Joey Levin, CEO, IAC (formerly InterActive Corp).
12:00pm-12:30pm	Presentation by Barry Diller, Chairman, Expedia and IAC (formerly InterActive Corp.); and Diane von Furstenberg, Chairman, Diane von Furstenberg Studio These prominent civic leaders will welcome the group, discuss their experience as NY employers since 9/11 and specifically their work developing Little Island, HighLine, and other civic ventures including efforts to rejuvenate NYC theatre post-Covid.
12:30pm-2:00pm	Walk to Little Island Picnic lunch.
2:15pm-2:45pm	Transportation to Penn Station
4:05pm	Depart Penn Station/Moynihan Hall for Washington via Amtrak 189 Snacks and beverages provided on board
7:35pm	Arrive Union Station Washington, DC

Bipartisan Senate Chiefs of Staff Conference September 10-12, 2021 List of Invited Staff

Dist of Invite	Labi	Sundiar	State
First	Abbott	Senator Collins	ME
Steve	Altman	Senator Lankford	OK
Michelle	Avitia	Senator Heinrich	NM
Rebecca	Bell	Senator Lee	UT
Allyson		Senator Ossoff	GA
Rey	Benitez	Senator Brown	ОН
Sarah	Benzing		AL
Stephen	Boyd	Senator Tuberville	PA
Dan	Brandt	Senator Toomey	wv
Joel	Brubraker	Senator Capito	WA
Jami	Burgess	Senator Cantwell	AK
Larry	Burton	Senator Sullivan	RI
Neil	Campbell	Senator Reed	FL
Craig	Carbone	Senator Rick Scott	KY
Terry	Carmack	Senator McConnell	TX
Steve	Chartan	Senator Cruz	SD
Kyle	Chase	Senator Rounds	
Dara	Cohen	Senator Rosen	NV
John	Connell	Senator Young	IN
Kathleen	Connery Dawe	Senator King	ME
Doug	Coutts	Senator Cotton	AR
Jen	Сох	Senator Kelly	AZ IA
Aaron	Cummings	Senator Grassley	MS
Doug	Davis	Senator Hyde-Smith	SC
Jennifer	DeCasper	Senator Tim Scott	AL
Wa <b>ts</b> on	Donald	Senator Shelby	MA
Jon	Donenberg	Senator Warren	VT
JP	Dowd	Senator Leahy	NJ
Veronica	Duron	Senator Booker	ND
Tony	Eberhard	Senator Hoeven	HI
Eric	Einhorn	Senator Schatz	NV
Scott	Fairchild	Senator Cortez Masto	VA
Elizabeth	Falcone	Senator Warner	TN
Sean	Farrell	Senator Blackburn	NY
Jess	Fassler	Senator Gillibrand	AK
Kaleb	Froehlich	Senator Murkowski	PA
Kristen	Gentile	Senator Casey	IA
Lisa	Goeas	Senator Ernst	NH
Marc	Goldberg	Senator Hassan	CA
David	Grannis	Senator Feinstein	ND
Mark	Gruman	Senator Cramer	н
Coti	Haia	Senator Hirono	KY
William	Henderson	Senator Paul Senator Kaine	VA
Mike	Henry	Senator Maine	

Bipartisan Senate Chiefs of Staff Conference September 10-12, 2021 List of Invited Staff

Allison	Herwitt	Senator Murphy	CT
Natasha	Hickman	Senator Burr	NO
Toni-Marie	e Higgins	Senator Boozman	AF
Luke	Holland	Senator Inhofe	OR
Beth	Jafari	Senator Cornyn	TX
Liz	Johnson	Senator Romney	UT
Meg	Joseph	Senator Sinema	AZ
Josh	Karetny (acting)	Senator Whitehouse	RI
Joshua	Kelley	Senator Braun	IN
James	Kelly	Senator Moran	KS
Joel	Kelsey	Senator Blumenthal	СТ
Lindsey	Kerr	Senator Klobuchar	MN
Chad	Kreikemeier	Seantor Shaheen	NH
Dan	Kunsman	Senator Barrasso	WY
Dylan	Laslovich	Senator Tester	MT
Ted	Lehman	Senator Tillis	NC
Emily	Leviner	Senator Fischer	NE
Mark	Libell	Senator Warnock	GA
Mindi	Linquist	Senator Murray	WA
Jeff	Lomonaco	Senator Smith	MN
Chris	Lynch	Senator Cardin	MD
Mike	Lynch	Senator Schumer	NY
Stacy	McBride	Senator Blunt	МО
Kirtan	Mehta	Senator Hickenlooper	co
Jeff	Michels	Senator Wyden	OR
David	Montes	Senator Padilla	CA
Mike	Needham	Senator Rubio	FL
Ryan	Nelson	Senator Thune	SD
Richard	Perry	Senator Graham	SC
Kyle	Plotkin	Senator Hawley	MO
James	Quinn	Senator Cassidy	LA
John	Rader	Senator Hagerty	TN
Misty	Rebik	Senator Sanders	VT
Ken	Reidy	Senator Baldwin	WI
Michelle	Richardson	Senator Wicker	MS
Sean	Riley	Senator Johnson	WI
Brent	Robertson	Senator Marshall	KS
Vick	Rossi	Senator Thune	SD
Tricia	Russell	Senator Van Hollen	MD
Carlos	Sanchez	Senator Lujan	NM
Ray	Sass	Senator Sasse	NE
Rob	Skjonsberg	Senator Rounds	SD
ess	Smith	Senator Bennet	co
Cevin	Smith	Senator Portman	ОН

Bipartisan Senate Chiefs of Staff Conference September 10-12, 2021 List of Invited Staff

Sharon	Soderstrom	Senator McConnell	KY
Patrick	Souders	Senator Durbin	IL
Emily	Spain	Senator Carper	DE
Jonathan	Stahler	Senator Coons	DE
Caitlyn	Stephenson	Seantor Peters	MI
David	Stokes	Senator Kennedy	LA
Jason	Thielman	Senator Daines	MT
Kalina	Thompson	Senator Duckworth	IL
Jason	Tuber	Senator Menendez	NJ
Matt	VanKuiken	Senator Stabenow	MI
Erin	Vaughn	Senator Schumer	NY
Kristin	Walker	Senator Lummis	WY
John	Walsh	Senator Markey	MA
Lance	West	Senator Manchin	WV
Susan	Wheeler	Senator Crapo	ID
Ryan	White	Senator Risch	ID
Alan	Yamamoto	Senator Hirono	HI
Michael	Zamore	Senator Merkley	OR



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Addendum to Private Sponsor Travel Certification Form, The Pew Charitable Trusts Management and

Leadership Conference, September 10-12, 2021

Date: September 22, 2021

New York, NY

- 1-10. See form
- 11. See attachment
- 12. See form
- 13. Through both its information and advocacy work, The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of the conference is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss issues of importance to an effective legislative process.
- 14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the eights Senate Chiefs of Staff conference hosted by Pew (2007, 2009, 2011, 2014, 2015, 2017, 2019). In the past, The Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.
- 15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens or research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.

16-25. See form.